



## **SONOMA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION**

### **BOARD OF RETIREMENT ANNUAL PLANNING SESSION AGENDA**

October 12 – 13, 2022

Vintners Resort  
4350 Barnes Road, Santa Rosa, CA 95403

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# **PLANNING SESSION 2022**

## **DAY ONE AGENDA**

**Wednesday, October 12**

7:30 .....Breakfast

8:30 .....Welcome and Introductions  
Brian Williams, Board Chair  
Julie Wyne, Chief Executive Officer

8:30 .....How to Avoid the Perils and Pitfalls of Being a Trustee  
Jeanna Cullins, Aon Partner

9:30 .....Break

10:00 .....Legislative Update  
Amy Brown, Partner, DiMare, Van Vleck & Brown

11:00 .....Investing with ESG Principles  
Moderator: Jeanna Cullins, Aon Partner  
(Axiom, Dodge & Cox, UBS AgriVest, JP Morgan)

12:30 .....Lunch

1:30 .....Simona Mocuta, Vice President & Senior Economist  
State Street Global Advisors

2:30 .....Break

3:00 .....Investment Manager Panel – Equities  
(Dodge & Cox, Systematic)

4:30 .....End of Session

# **PLANNING SESSION 2022**

## **DAY TWO AGENDA**

**Thursday, October 13**

7:30 .....Breakfast

8:30 .....Investment Manager Panel – Real Estate & Farmland  
(JP Morgan, UBS TPF & AFF, Fiera Comox)

10:00 .....Break

10:30 .....Investment Manager Panel – Fixed Income  
(Reams, PIMCO, DoubleLine, Guggenheim)

12:00 .....Lunch

1:00 .....Investment Manager Panel – Infrastructure  
(IFM, KKR, Axium)

2:30 .....Break

3:00 .....Changing Demographics  
Jay Olshansky, University of Illinois

4:30 .....Planning Session Wrap-up  
Brian Williams  
Julie Wyne

4:30 .....End of Session